P-CARD USER MANUAL

ATTACHING SCANNED DOCUMENTS

INTRODUCTION

You can scan receipts, invoices, etc., and attach them to the transactions or transmittal. The scanned documents will then be in the application for approvers, auditors, or managers to view online.

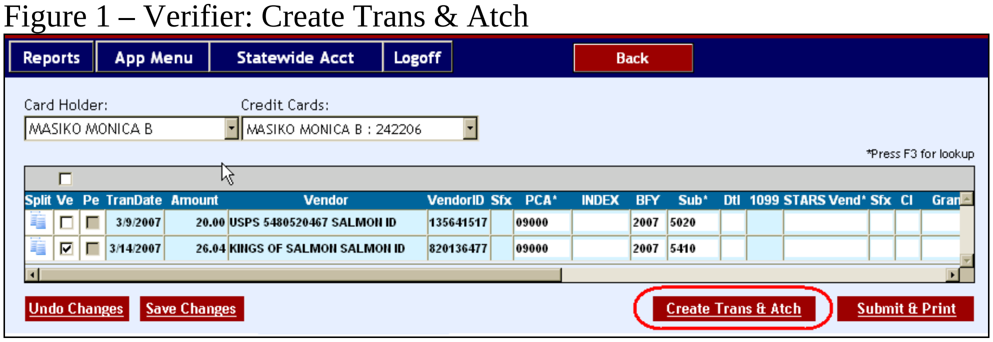
Documents must be scanned at your agency or agency field location and saved on a local or network hard drive. You can then browse for and upload the scanned files into the application.

TO ATTACH A DOCUMENT

1. Open the **Attachments** section according to whether you are a Verifier or an Approver:
   - <u>Verifier</u>: Click **Create Trans & Atch**. The **Attachments** section will be displayed below the transactions.

     CAUTION: This creates a transmittal ("**Create Trans"**) in order to attach ("**Atch**") documents to it. If you click this, you must attach a file.

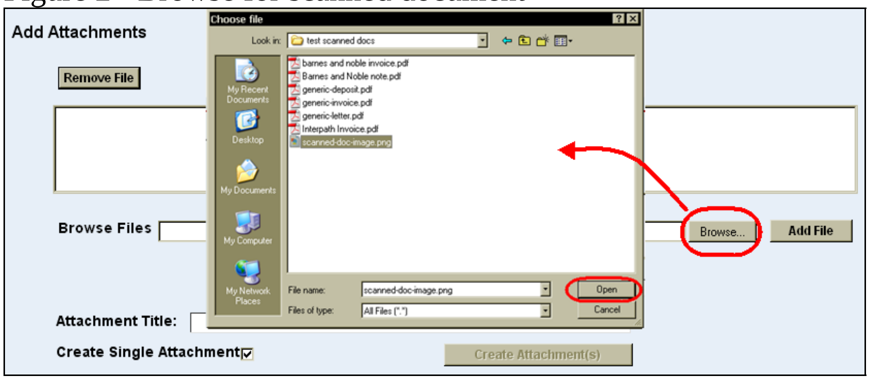
Figure 1 – Verifier: Create Trans & Atch



   - <u>Approver</u>: Select a transmittal from the **Select Transmittal** menu or enter a transmittal number in the **Enter Transmittal** field and press ENTER. The **Attachments** section will be displayed below the transactions.

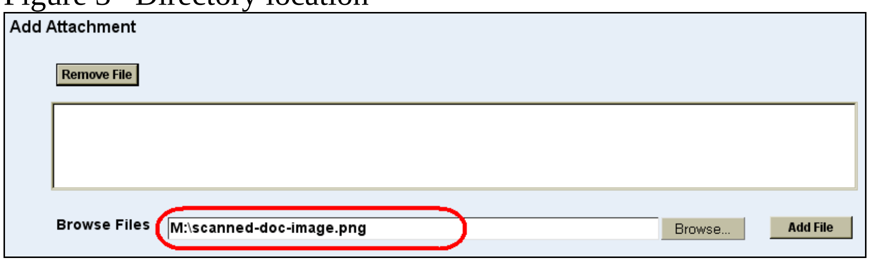
2. Click **Browse** to locate your scanned document file. Valid types include files with the following extensions: .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff. (The file extension .jpeg will not work.)

Figure 2 - Browse for scanned document



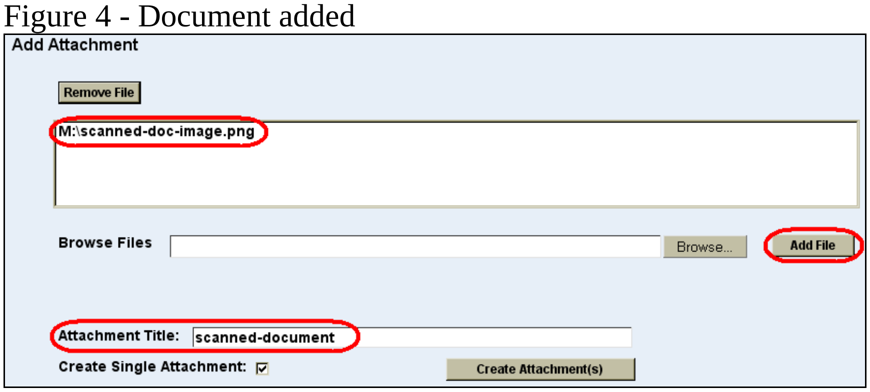
3. Highlight the scanned document file and click **Open**. The directory location of the document will appear in the **Browse Files** field.

Figure 3 –Directory location



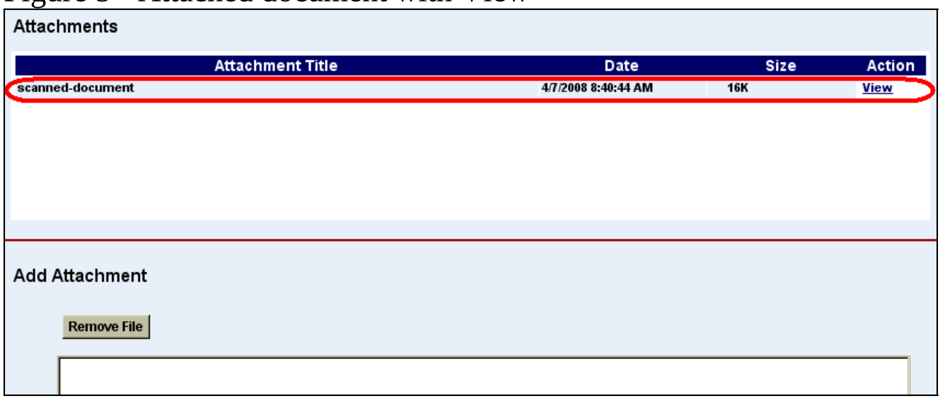
4. Click **Add File**. The document will be added to a queue. The filename (without the extension) of the scanned document will be automatically entered in the **Attachment Title** field.

Figure 4 - Document added



5. If desired, change the **Attachment Title** to something more suitable for the document. Otherwise, leave the default title based on the file name.
6. For only one document, leave **Create Single Attachment** checked. If you have changed the **Attachment Title**, this will apply the change. For more than one file, see Attaching Multiple Documents section below.
7. Click **Create Attachment(s)**. The document will appear in the **Attachments** area. (Click **View** if you want to view the attachment.)
8. As a Verifier, click **Submit & Print**. As an Approver, click **Reprint Transmittal**.

Figure 5 - Attached document with View

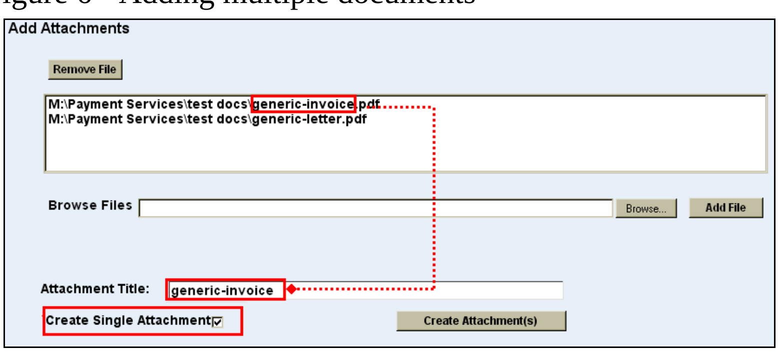


TO ATTACH MULTIPLE DOCUMENTS

You can create attachments from multiple scanned documents either one at a time or all at once. If you create the attachments at one time, you will not be able to enter unique **Attachment Titles** for each one In order to add multiple documents and give them unique Document Titles, add and create the attachments one at a time.

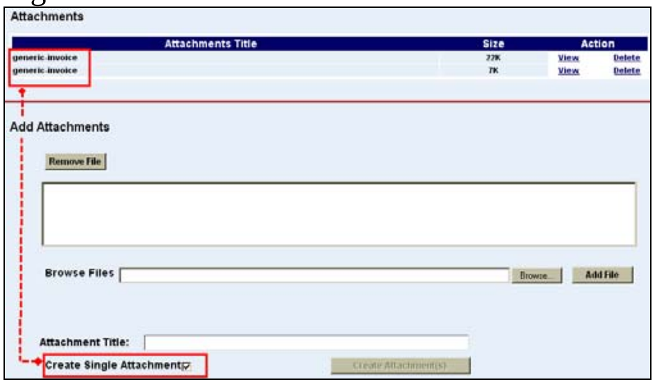
1. Repeat the steps above to add a second document to the queue. Note the **Attachment Title** field remains the same from the first document added. In the example below, the file "generic-letter.pdf" was added, but the name from the first file, "generic-invoice" is still in the **Attachment Title** text box.
2. Continue adding as many documents as needed.

Figure 6 - Adding multiple documents



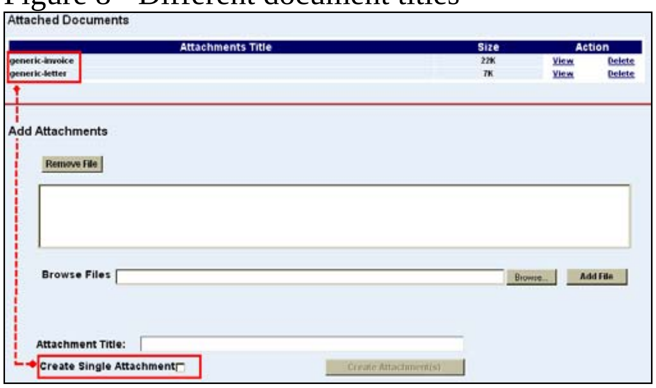
3. Leave **Create Single Attachment** checked or click the check box to clear it. Your choice will affect the **Attachment Title** of the attached documents:
   a. Leave the checkbox checked, click **Create Attachment(s)**, and all of the documents will have the *same* **Attachment Title** based on the filename of the first document added.

Figure 7 - Same document title



   b. Clear the **Create Single Attachment** check box, click **Create Attachment(s)**, and the documents will have *different* **Attachment Titles** based on their filenames.

Figure 8 - Different document titles



SCANNER SETTINGS

Several factors must be considered when scanning documents for your agency, – e.g., the type of scanner or multi-function machine you use and its settings, hard disk storage capacity at your agency, and the type of originals (size and color of paper, size and color of print, etc.). Each agency will need to develop their own best practices appropriate for their environment. Two settings often found on scanners and multi-function machines are:

Resolution: Generally scanners will offer a scanning resolution setting expressed in "dpi" or dots per inch. The lower the setting the smaller the file size, but the worse quality of image produced. With most documents, a setting of 150dpi seems to work well.

File formats: You particular scanner or and multi-function machines may be capable of producing a variety of file formats (e.g., .pdf,.jpg,.gif,.bmp,.png,.tif,.tiff). For many agencies, .jpg and .pdf work well.

You should test your own equipment to see which resolution and file format settings create the smallest file size with acceptable visual quality.

DOCUMENT RETENTION

Your agency may need to develop document retention rules to determine if copies will be kept by your agency as well and for how long. Refer to the Department of Administration's Web site for record retention information.